CETRA

USER MANUAL

Centre for Education & Training Records Application

CETRA V1.00BETA
UM V1.10
July 2012

Before you begin…

- Before logging in to CETRA, ensure that the computer is up-to-date with the correct internet browser.
- CETRA will only work with **Internet Explorer 7 or newer.**
  - To check the version, open Internet Explorer, press ALT+H, click About Internet Explorer OR contact your IT Support Specialist.
  - If you are using an older version of Internet Explorer, contact IT Support to upgrade.

Before you begin… (cont'd)

- To ensure that you can navigate through the system properly, you must enable **Compatibility View Mode** in **Internet Explorer**.
- Follow these instructions to do this yourself or contact your IT Support Specialist for assistance.
  1. Click on "**Tools**" (Can't find tools? Press the ALT key on your keyboard to activate the menu)
  2. Select "**Compatibility View Settings**"
  3. In the "**Add this website**" field, type "***tcet.com***"
  4. Click "**Add**"
  5. Click "**Close**"
  6. Refresh your browser

Getting started

1. To get started, launch **Internet Explorer**
2. In the Address Bar, type: ***cetra.tcet.com***
   - TIP: Do not include **www** before the address

- For easy access, add CETRA as a desktop shortcut *OR* Internet Explorer Favorite.
  - Consult with IT Support about how to do this

TIP: Does your login button look like this?

If so, you're not using Internet Explorer.

Logging in/Password Retrieval

Logging in

- Use your assigned Login ID and password.

Login ID:

- Your login ID is your **First Name Initial + Last Name**.
  - E.g. JOHN SMITH -> **JSMITH**
  - TIP: The Login ID will automatically default to CAPS, ensure that Caps Lock is *off*.
- Your default password: **Welcome00**.
  - For security reasons, the password should be changed often.

Forgot your Password?

1. To recover the password, click on the link below the login screen
   Forgot your Password?
2. Follow the on-screen instructions, the password will automatically be emailed to the email address on file.

CETRA ©
Enter your Login ID and Password to sign in.
Login ID:
Password:
Clear
Login
Internet Explorer ONLY! Password is case sensitive.
Forgot your Password?
FORGOT YOUR PASSWORD?
Please enter your CETRA login ID to retrieve your password.
Login ID: JSMITH
OK
Cancel
Note: An email with your login ID and password will be sent to the email address connected to your CETRA account.
For assistance, please email us at rhamid@tcet.com

CETRA Interface

Main Menu
All functional menus are contained within the buttons seen in this section. Buttons will vary depending on the user account/role.

User Information
User first + last name
Log-out button

Home
Button will clear all active screens

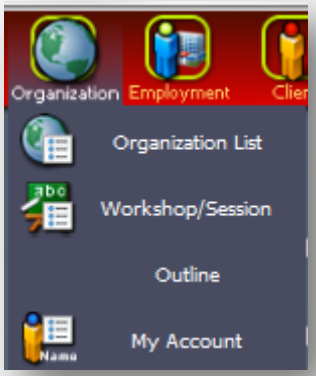
Shortcut Menu
Shortcuts to most commonly used menus

Footer
Application version/Copyright information

Lower Toolbar
Need Help: Email trigger to CETRA support team for assistance
How Do I: Quick usage tips
Feedback: Email trigger to CETRA support team to provide feedback
Messages: Notifications/Visits menu

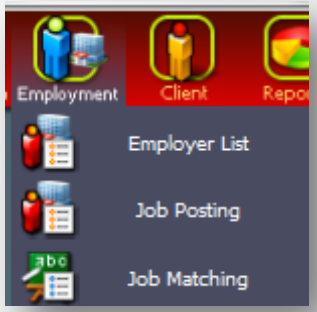
CETRA Interface: Main Menu

Organization



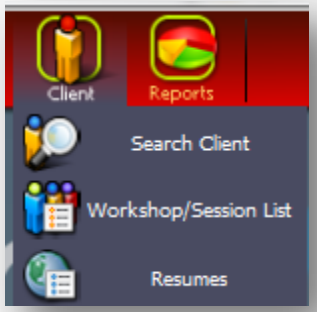
Organization List: (*TCET*) Company and Site setup
Workshop/Session Outline: Setup for Workshops/Sessions
My Account: Password reset, email and service verification

Employment



Employer List: (*ES*) company/contact setup
Job Posting: (*ES*) setup for jobs
Job Matching: (*ES*) Client – job matching

Client



Search Client: Search find client, edit file, create new file.
Workshop/Session list: Attendance, print list
Resumes: (*ES*) Client resume management

Reports

Monthly Reports: Pre-formatted monthly reports
Dynamic Reports Ad hoc reporting system

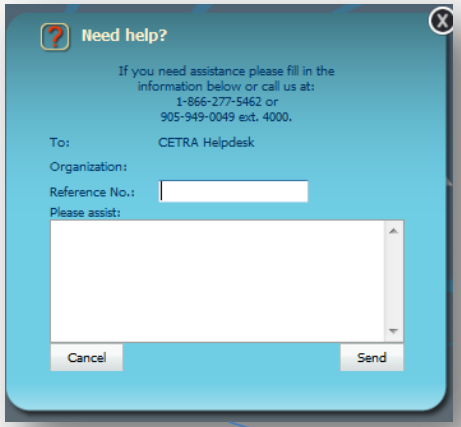
Menu options may vary depending on user roles and accounts

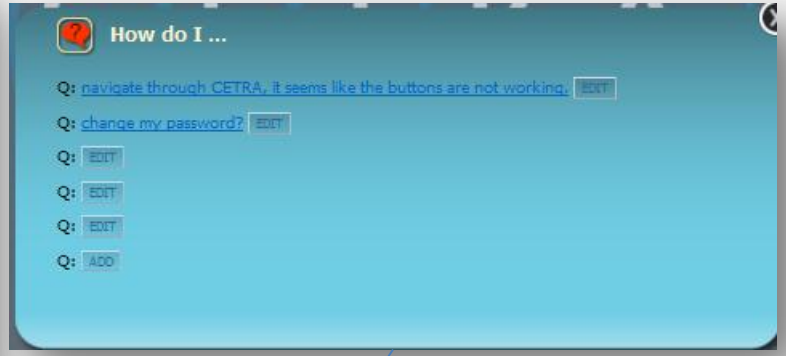
CETRA Interface: Lower Toolbar

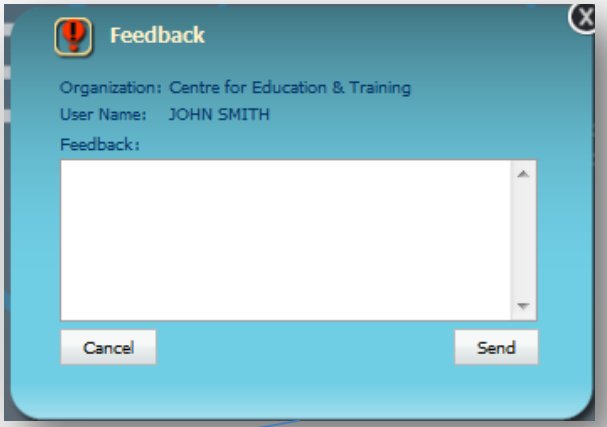
If assistance is required with a client file or workshop/session, use the **Need Help** section to send an email to the Help Desk.
*Ensure that the **REF#** or **Session Code** is quoted*

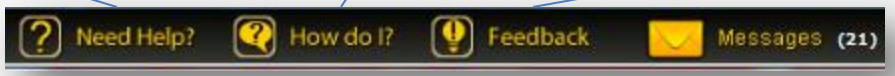
For quick tips, reminders and troubleshooting with simple tasks, check the **How Do I** section to find a solution prior to contacting the Help Desk.

To provide feedback or suggestions about the system, use the **Feedback** section to send an email.




How do I ...
Q: navigate through CETRA, it seems like the buttons are not working. EDIT
Q: change my password? EDIT
Q: EDIT
Q: EDIT
Q: EDIT
Q: ADD





Messages: Notifications/Updates

- The **News** tab of the **Messages** screen (*Lower Toolbar*) will appear by default upon Login.
- Notifications and system updates from the CETRA development team will be posted in this section.
- This window can be opened at any time by clicking the Messages button in the lower toolbar.
  - New/unread messages will be **Bold.**
  - The counter will reflect the number of unread messages.

Messages
Create
Inbox (0)
Sent
Requests (0)
News (0)
Visits (51)
Forms
TCET Registration Form - February 2012 Revision
WHAT'S NEW
13-Feb-2012 Enhancements - ES Needs (R&I/CS)
08-Feb-2012 Enhancements - General
06-Feb-2012 Enhancements (Workshop/Session List - Print Form)
23-Dec-2011 Enhancements (ES Job Search Profile)*CAREER SPECIALISTS
07-Dec-2011 Enhancements (OCC Component)
07-Dec-2011 Enhancements (Client File)
NOTICE: System cleanup will be conducted during the month of February to provide ease of use. At this time we will be renaming buttons, titles and making other minor changes. All efforts will be made to consider feedback that has been received. Thank you.
EDIT
1.00BETA
Copyright © 2012 CETRA
Need Help?
How do I?
Feedback
Messages (0)

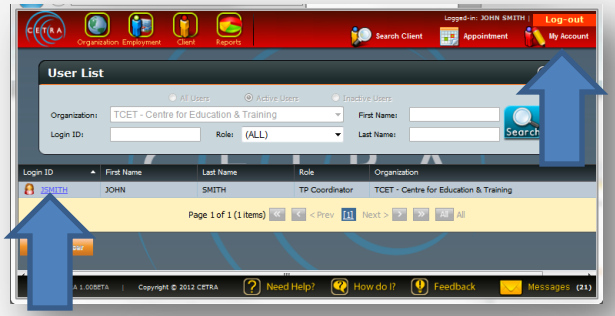
My Account: User Account Information

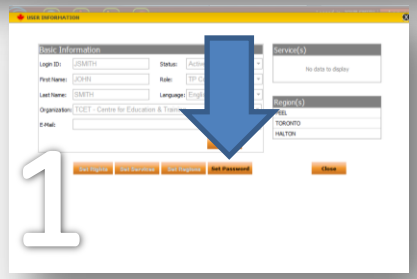
Once logged in, click the

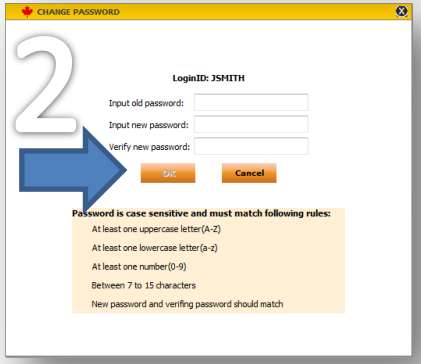
button from the shortcut menu, then select your username.

This section will allow you to:

- **View the email address on file**
  - If there is a typographical error in the email address, contact CETRA staff.
- **View your Service(s)**
  - Your department will be listed here, if an error is notice, contact CETRA staff.
- **Change your password**
  1. To do this, click on the "**Set Password**" Button
  2. Follow the instructions on screen.







Visits: Client Turnstile

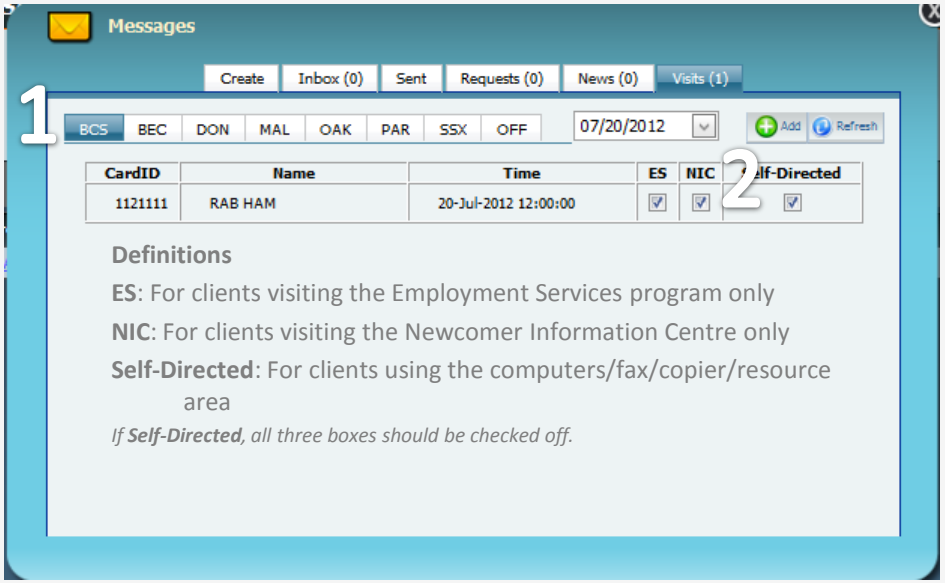
- When a client visits a site, they are required to scan their TCET Client Card at the front desk barcode scanner. The information from their card is sent to CETRA. The information collected here is vital for the reporting purposes.
- The scan record can be viewed in the **Visits** tab. This section is accessed through the **Messages** window (Lower Toolbar)

1. Select the abbreviated tab for your site. (i.e. Sussex = **SSX**)
2. Amend the boxes next to the scan record accordingly

NOTE : By default, a scan is recorded as a "self-directed" service, giving a count to both ES+NIC.*

NOTE : To amend the scan record, click or unclick the checkbox.

NOTE: New client scans should not be amended as Orientation provided is a NIC & ES service.



Note: (NIC Program) If initial daily scan is self-directed, NIC Survey should not include "In House – Computer/Internet" Service.

**Defaults vary by site.*

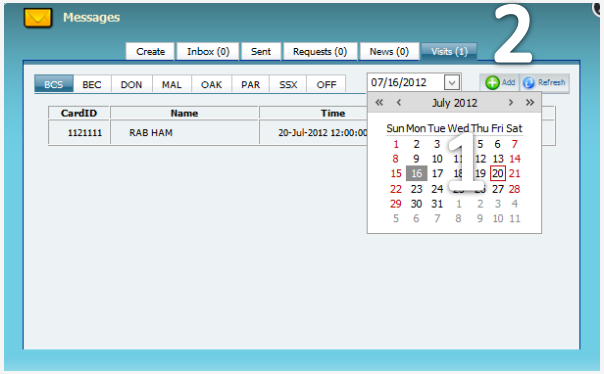
Visits: Client Turnstile (cont'd)

If a physical card is not present, a manual visit can be logged

1. From the calendar, select the date of visit.
2. Click the Add button.
3. A dialogue box will appear with 2 fields, enter the **Card ID** – OR – client **REF#** and press submit.

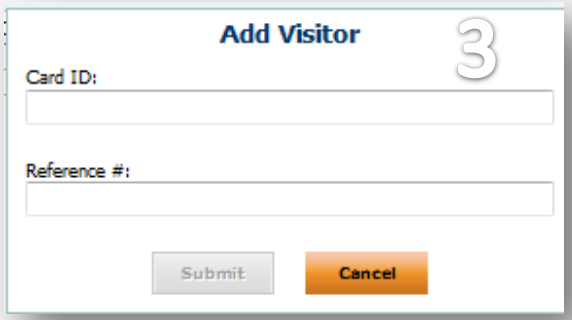
   NOTE: Client file must exist in order to log a manual visit.

   NOTE: If client is not a card-holder, use REF# to log a manual visit.



- To remove a record from the daily count, simply clear all 3 check boxes next to the record.

  NOTE: If a scan has been recorded more than once a day, only the first record of the day will be counted.



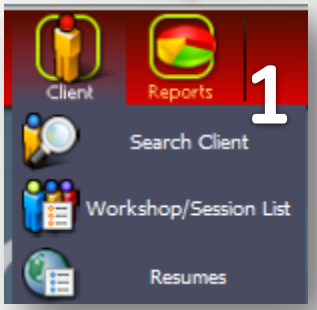
Troubleshooting: If scan records do not appear in CETRA:

a) Ensure that **LogVisits*** application is running

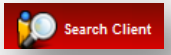
b) Restart the **LogVisits*** application.

*LogVisits Appliaction does not run on TouchScreen systems

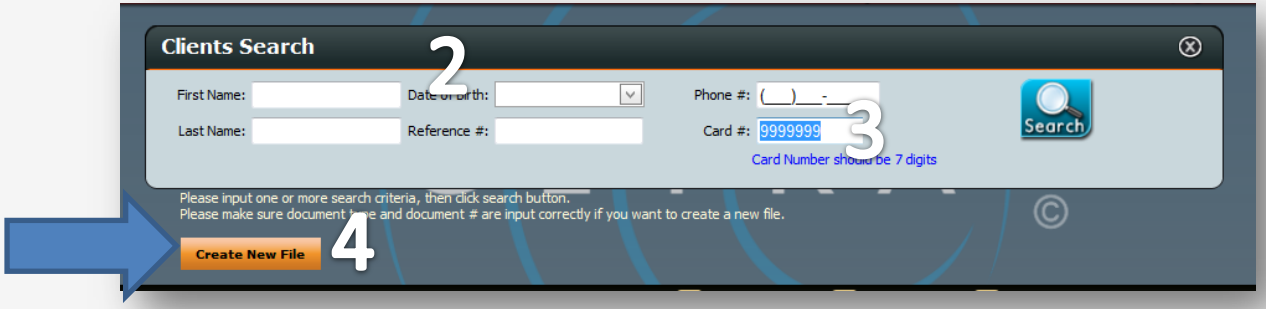
Search Client: Create New File



If a client is not a card-holder, their file should be searched using the Search Client menu

1. From the **Client** menu (or shortcut), select 

2. Enter search criteria to find file, start with a vague search.
3. If file does not exist, enter a new 7-digit card number in the **Card#** field. (For phone clients, see *Create New File Using Generic Card#*)
4. Click **Create New File**.

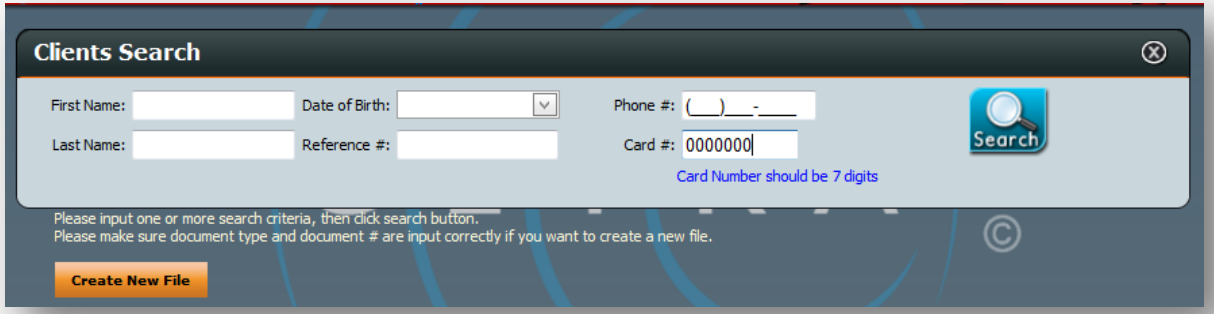


Search Client: Create New File Using Generic Card#

For clients wishing to register over the phone, use generic a **Card #** to create a file

Based on the site, use one of the following:

- **NIC-Offsite/Itinerant: 0000000**
- **Mississauga: 1111111**
- **Malton: 2222222**
- **Oakville: 3333333**
- **Brampton South: 4444444**
- **Brampton East: 5555555**
- **Parliament: 6666666**
- **Don Mills: 7777777**


Clients Search
First Name:
Date of Birth:
Phone #:
Last Name:
Reference #:
Card #:
0000000
Card Number should be 7 digits
Search
Please input one or more search criteria, then click search button.
Please make sure document type and document # are input correctly if you want to create a new file.
Create New File

Create New File (cont'd)

1. Begin entering the client's information from the Registration Form into the **General Information** tab

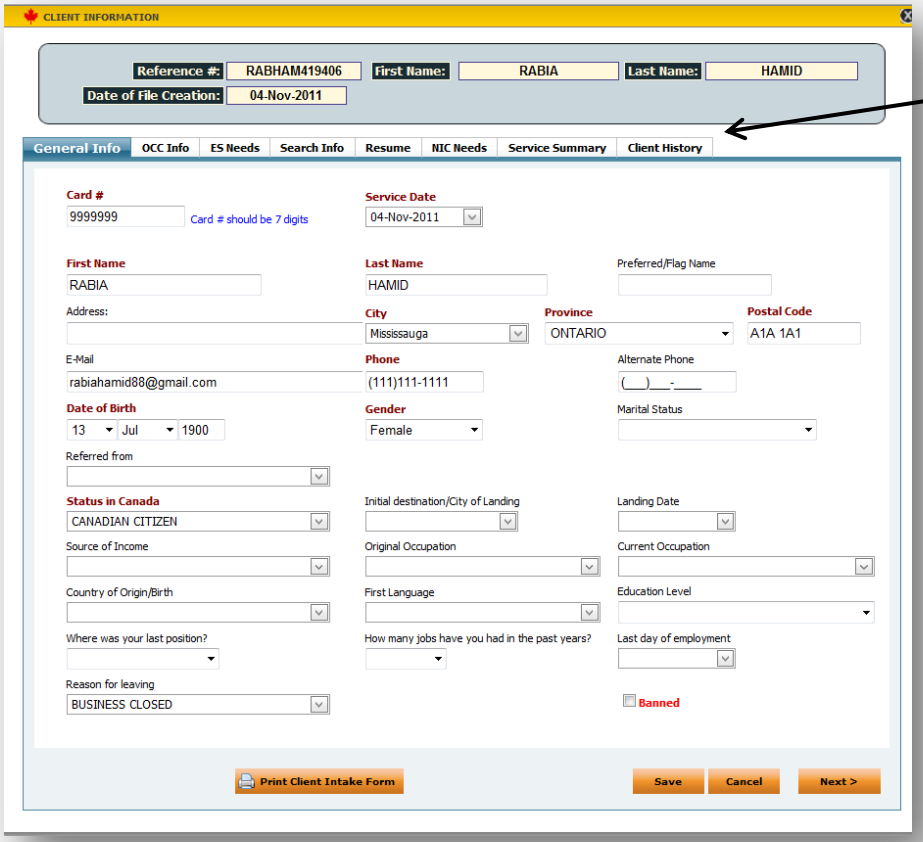
   NOTE: **Red** fields are mandatory

2. Save the file in order to generate a **Reference #**

   NOTE: **REF#**s are unique to each client file and should be used in combination with the **Card#** to identify the client.

3. To print a copy of the registration form, click **Print Client Intake Form**

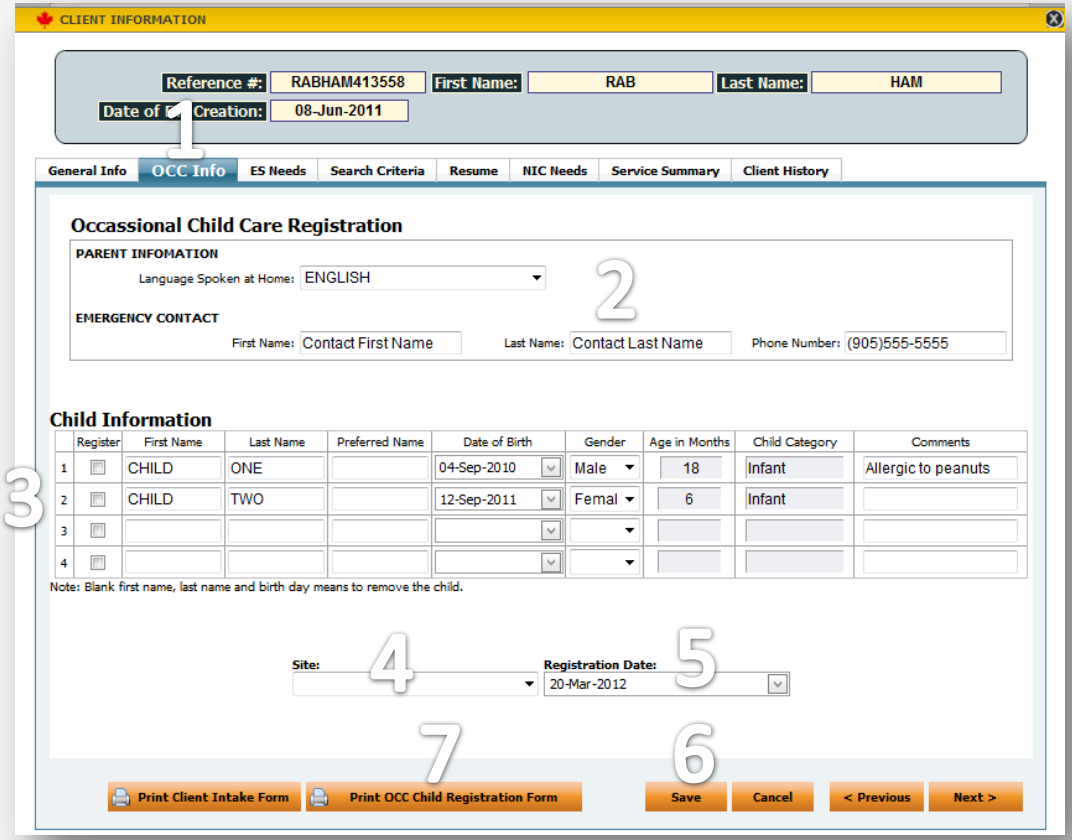
   NOTE: Form can only be printed after a REF# is generated.



Tabs will vary depending on user account

Client File: Occasional Child Care (NIC OCC)

1. To register a child for OCC services, click on the **OCC Info** tab of the Client File
2. Input the information (**Parent Info, Emergency Contact, Child Information**)
3. Click check-box next to the child who will be registered
4. Select the OCC **site**
5. Select the **Registration Date**
6. Press **Save**
7. Print **OCC Child Registration** Form for parent's signature

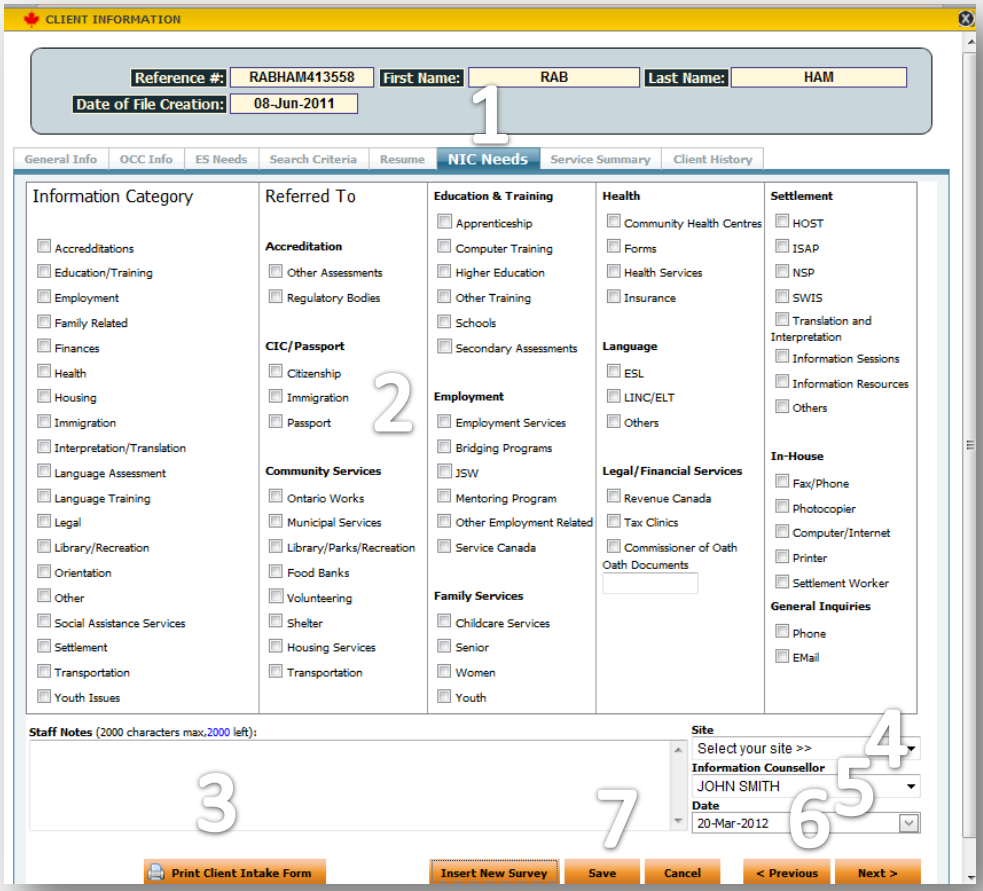


Children under 19 months cannot be registered for this service

Client File: NIC Needs (NIC)

1. To record NIC services using the Survey, click **NIC Needs** tab in Client File
2. Input data from NIC Survey using check-boxes
3. Enter **Staff Notes**
4. Select **Site**
5. Select **Information Counselor** name or *Self-Directed*
6. Select **date** of service
7. Press **Save**

To insert a new survey, click **Insert New Survey** and repeat the process.



Client File: Employment Services Needs

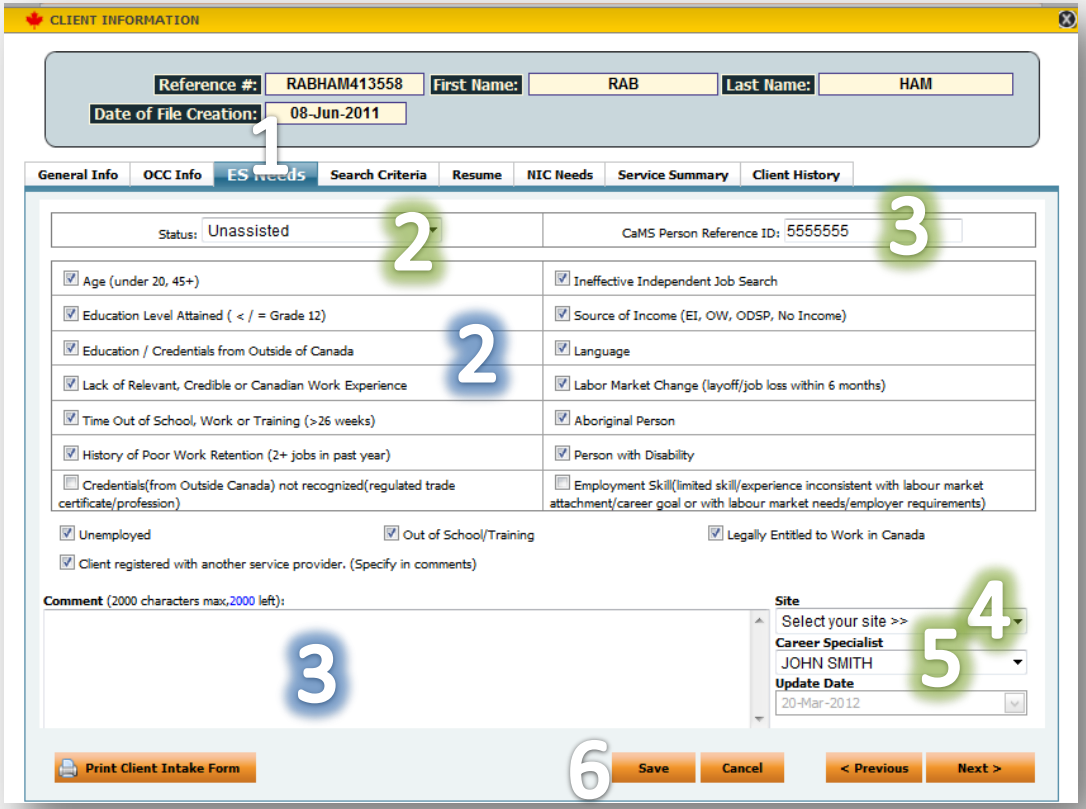
1. Click on the **ES Needs** Tab in the Client File

R&I Staff

2. Complete *Suitability Factors* using check-boxes
3. Input **Comments**

Career Specialists

2. Assign a **Status**
   (Unassisted, Assisted (Job Search, JMPI, In Placement, Employed, Retention, In Training), Inactive)
3. Input **CaMS Person Reference ID#**
4. Select **Site**
5. Select **Career Specialist** (Assisted Clients *ONLY*)
6. **Save**



Note: Contents of this page will only appear on the Client Intake Form once saved

Client File: Search Criteria - Job Search Profile (ES)

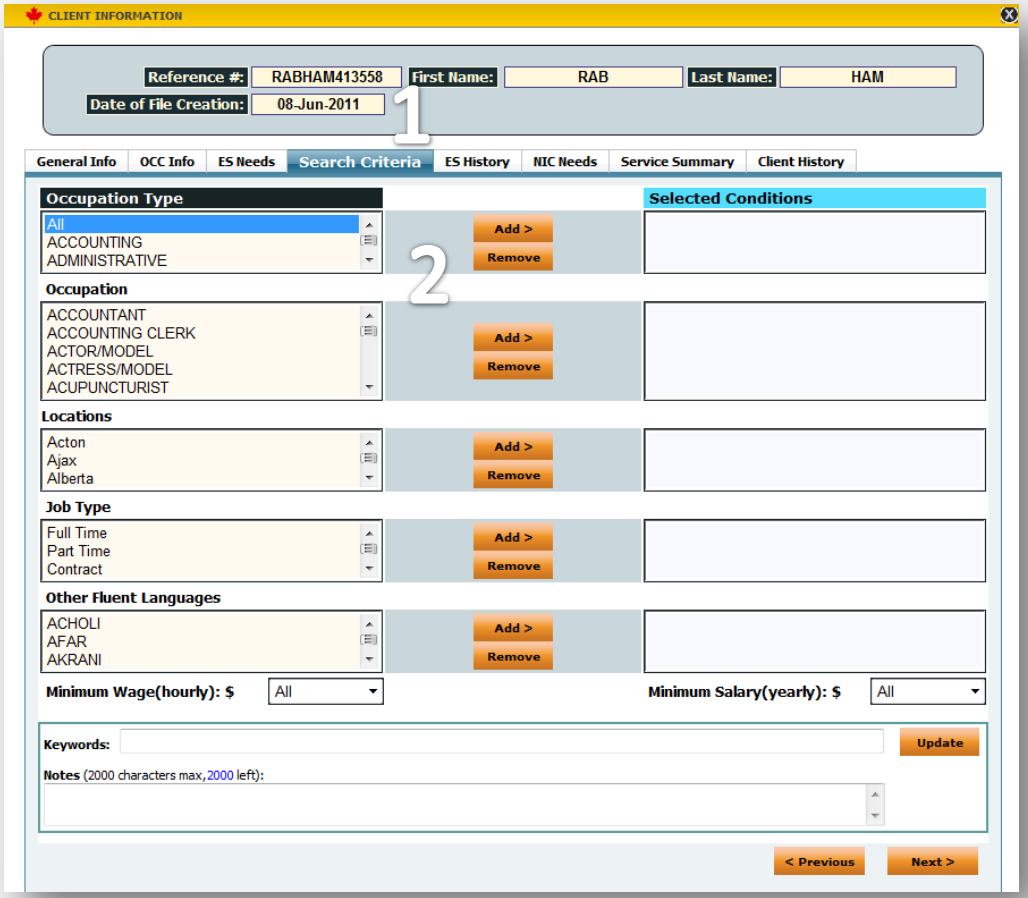
Career Specialists

This section must be completed in order for the client to be considered for job matching.

1. Click on the **Search Criteria** Tab in the Client File
2. Select criteria from the left columns, use **Add>** button to bring to right
   - To find an **Occupation**, Click on an **Occupation Type** – this will update the list of Occupations

Tips:

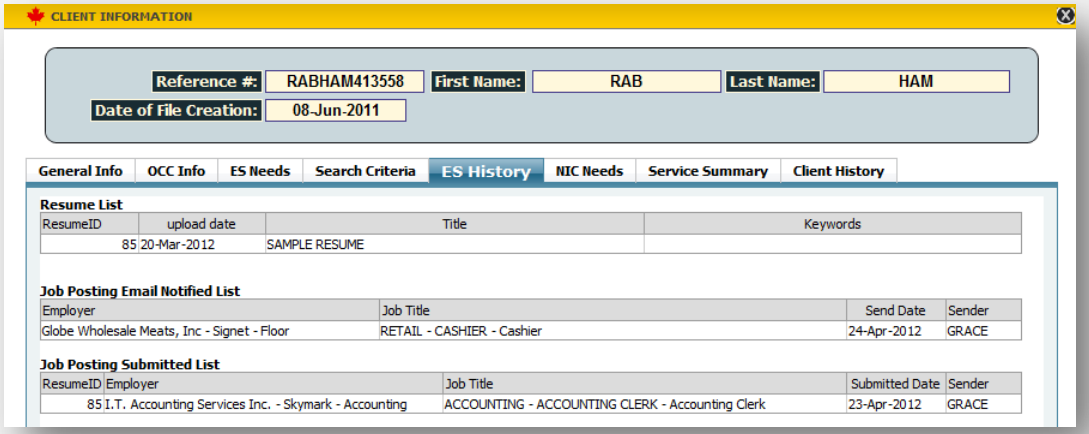
- Occupation Type/Occupation – Select criteria from at least 1 or both of these sections in order for the client to be matched
- Location: Select only if client is restrictive of employment location
- Job Type: Select only if client is restrictive of job type
- Other Fluent Languages: Select all that apply (omit English)
- Wage/Salary: input minimum based on client's requirement
- Keywords: input skills, certificates, etc. Separate with comma



Note: Up to 3 criteria can be selected for each list
Note: Information is saved immediately
Tip: To quickly jump to a criteria, use your keyboard to type the first letter

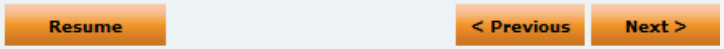
Client File: ES History (ES)

This section is a view-only page with the client's history.



Career Specialists

- To add/manage resumes, click the button at the bottom of the page.



- For uploading and managing resumes, see **Resume Management**

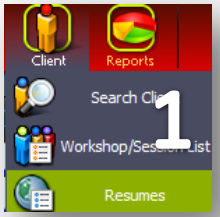
Definitions

Resume List: A list of all resumes currently uploaded to the client file.

Job Posting Email Notified List: A list of all job postings which have been sent to the client.
*(See **Job Posting** for sending to clients)*

Job Posting Submitted List: A list of all job postings and respective employers which have been sent resumes for this client.
*(See **Job Matching** for sending resumes to employers)*

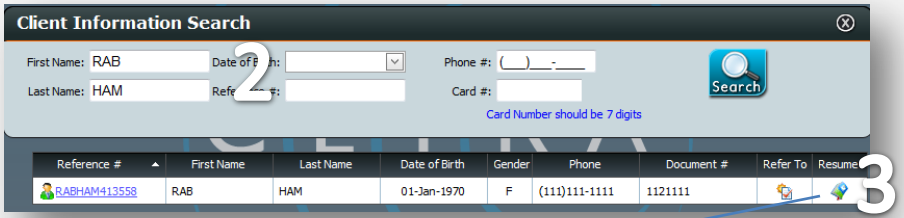
Client File: Resume Management (ES)



Career Specialists

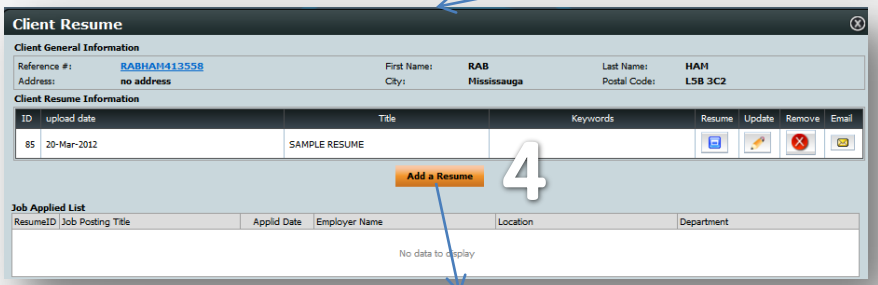
1. From the **Client** menu, select **Resumes**
2. Search-find the client file
3. Click the Resume button in the search result

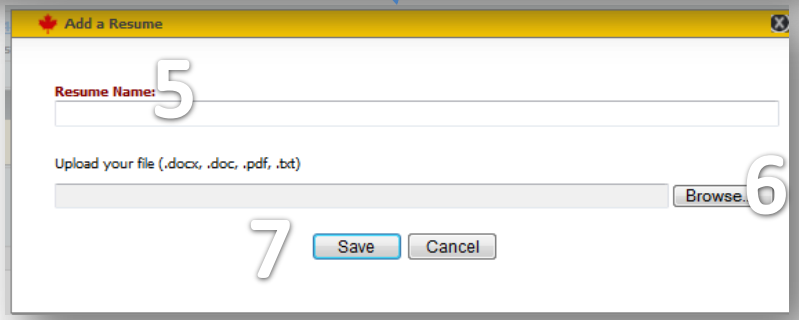
This section can also be accessed via **ES History**



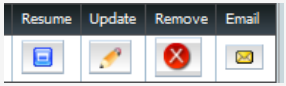
4. To upload a resume, click **Add a Resume**
5. Enter a name in the **Resume Name** field
   (Usually resume type or occupation)
6. Click **Browse** and navigate to the file on your local computer
7. Press **Save**

- To **view/update/remove** use the toolbar





- **Email** function to send resume to employer is also available in this section.

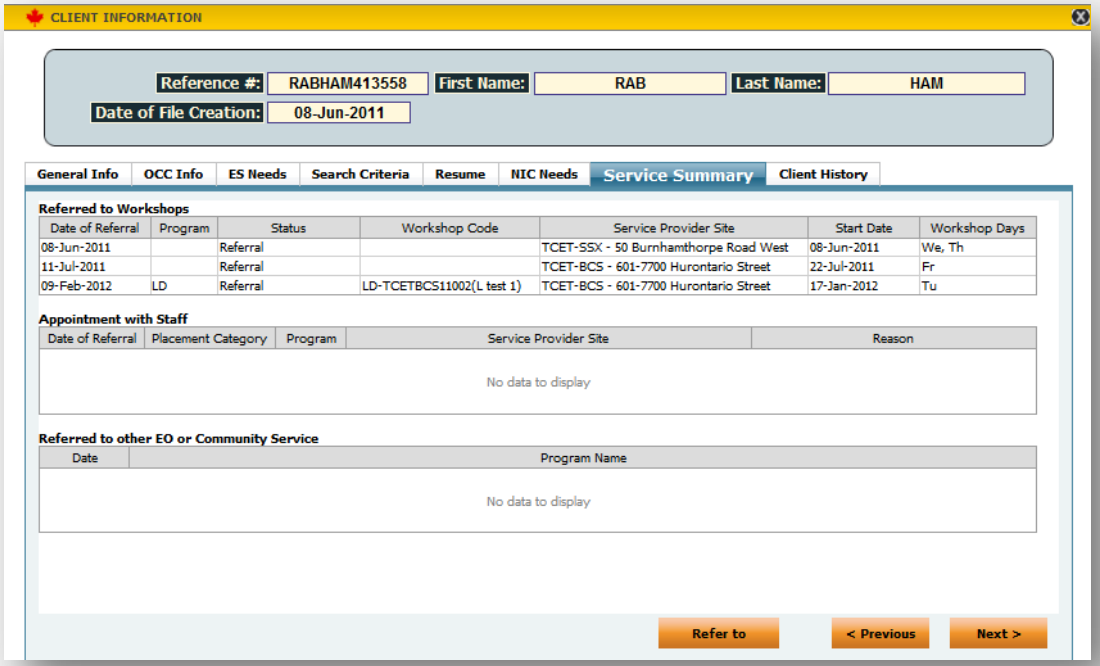


Client File: Service Summary

- The **Service Summary** tab is a view-only list of Workshops/Sessions that a client is currently enrolled in. (upcoming only)

- To refer the client to a workshop/session, click **Refer to**

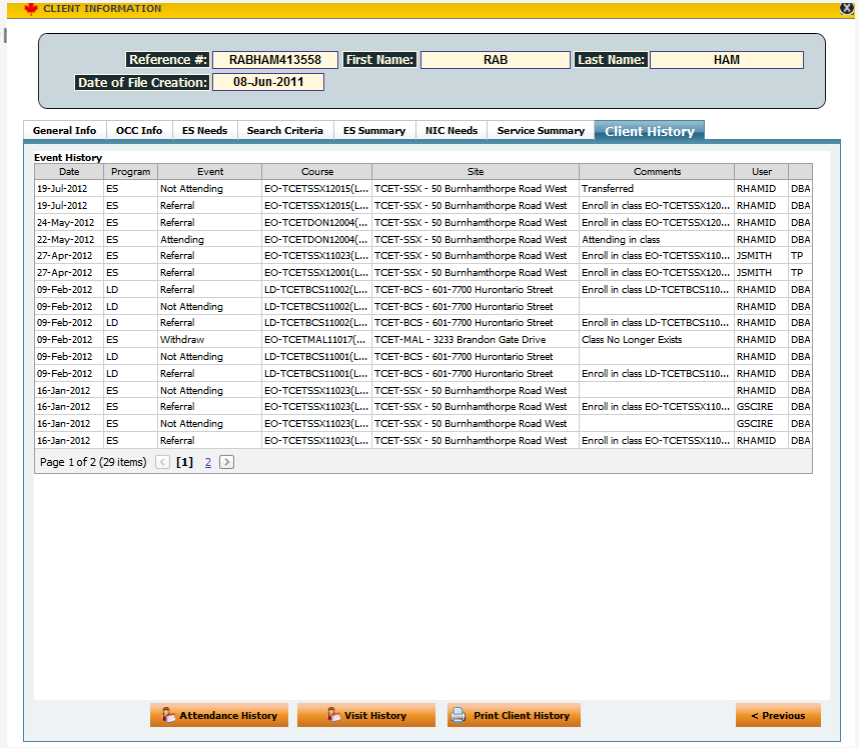
  (See **Workshop/Session: Referral** for complete referral instructions)


CLIENT INFORMATION
Reference #: RABHAM413558
First Name: RAB
Last Name: HAM
Date of File Creation: 08-Jun-2011
General Info
OCC Info
ES Needs
Search Criteria
Resume
NIC Needs
Service Summary
Client History
Referred to Workshops
Date of Referral | Program | Status | Workshop Code | Service Provider Site | Start Date | Workshop Days
08-Jun-2011 | | Referral | | TCET-SSX - 50 Burnhamthorpe Road West | 08-Jun-2011 | We, Th
11-Jul-2011 | | Referral | | TCET-BCS - 601-7700 Hurontario Street | 22-Jul-2011 | Fr
09-Feb-2012 | LD | Referral | LD-TCETBCS11002(L test 1) | TCET-BCS - 601-7700 Hurontario Street | 17-Jan-2012 | Tu
Appointment with Staff
Date of Referral | Placement Category | Program | Service Provider Site | Reason
No data to display
Referred to other EO or Community Service
Date | Program Name
No data to display
Refer to
< Previous
Next >

Client File: Client History

- The Client History tab is a view-only list of all actions taken in this clie

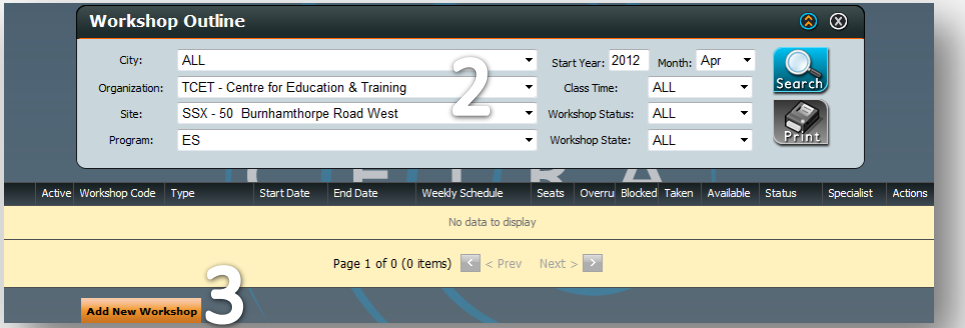
- The following items can be viewed in this tab:
- Client's file creation date
- Workshop Referral
- Workshop Attendance
- Visit History (Via **Visit History** Button)


CLIENT INFORMATION
Reference #: RABHAM413558
First Name: RAB
Last Name: HAM
Date of File Creation: 08-Jun-2011
General Info
OCC Info
ES Needs
Search Criteria
ES Summary
NIC Needs
Service Summary
Client History
Event History
Date Program Event Course Site Comments User
19-Jul-2012 ES Not Attending EO-TCETSSX12015(L... TCET-SSX - 50 Burnhamthorpe Road West Transferred RHAMID DBA
19-Jul-2012 ES Referral EO-TCETSSX12015(L... TCET-SSX - 50 Burnhamthorpe Road West Enroll in class EO-TCETSSX120... RHAMID DBA
24-May-2012 ES Referral EO-TCETDON12004(... TCET-SSX - 50 Burnhamthorpe Road West Enroll in class EO-TCETSSX120... RHAMID DBA
22-May-2012 ES Attending EO-TCETDON12004(... TCET-SSX - 50 Burnhamthorpe Road West Attending in class RHAMID DBA
27-Apr-2012 ES Referral EO-TCETSSX11023(L... TCET-SSX - 50 Burnhamthorpe Road West Enroll in class EO-TCETSSX110... JSMITH TP
27-Apr-2012 ES Referral EO-TCETSSX12001(L... TCET-SSX - 50 Burnhamthorpe Road West Enroll in class EO-TCETSSX120... JSMITH TP
09-Feb-2012 LD Referral LD-TCETBCS11002(L... TCET-BCS - 601-7700 Hurontario Street Enroll in class LD-TCETBCS110... RHAMID DBA
09-Feb-2012 LD Not Attending LD-TCETBCS11002(L... TCET-BCS - 601-7700 Hurontario Street RHAMID DBA
09-Feb-2012 LD Referral LD-TCETBCS11002(L... TCET-BCS - 601-7700 Hurontario Street Enroll in class LD-TCETBCS110... RHAMID DBA
09-Feb-2012 ES Withdraw EO-TCETMAL11017(... TCET-MAL - 3233 Brandon Gate Drive Class No Longer Exists RHAMID DBA
09-Feb-2012 LD Not Attending LD-TCETBCS11001(L... TCET-BCS - 601-7700 Hurontario Street RHAMID DBA
09-Feb-2012 LD Referral LD-TCETBCS11001(L... TCET-BCS - 601-7700 Hurontario Street Enroll in class LD-TCETBCS110... RHAMID DBA
16-Jan-2012 ES Not Attending EO-TCETSSX11023(L... TCET-SSX - 50 Burnhamthorpe Road West RHAMID DBA
16-Jan-2012 ES Referral EO-TCETSSX11023(L... TCET-SSX - 50 Burnhamthorpe Road West Enroll in class EO-TCETSSX110... GSCIRE DBA
16-Jan-2012 ES Not Attending EO-TCETSSX11023(L... TCET-SSX - 50 Burnhamthorpe Road West GSCIRE DBA
16-Jan-2012 ES Referral EO-TCETSSX11023(L... TCET-SSX - 50 Burnhamthorpe Road West Enroll in class EO-TCETSSX110... RHAMID DBA
Page 1 of 2 (29 items) [1] 2
Attendance History
Visit History
Print Client History
< Previous

Workshop/Session: Setup

1. From the **Organization** menu, click on **Workshop Outline.**
2. Using the search criteria, find your workshop to avoid duplication.
3. If it does not exist, click

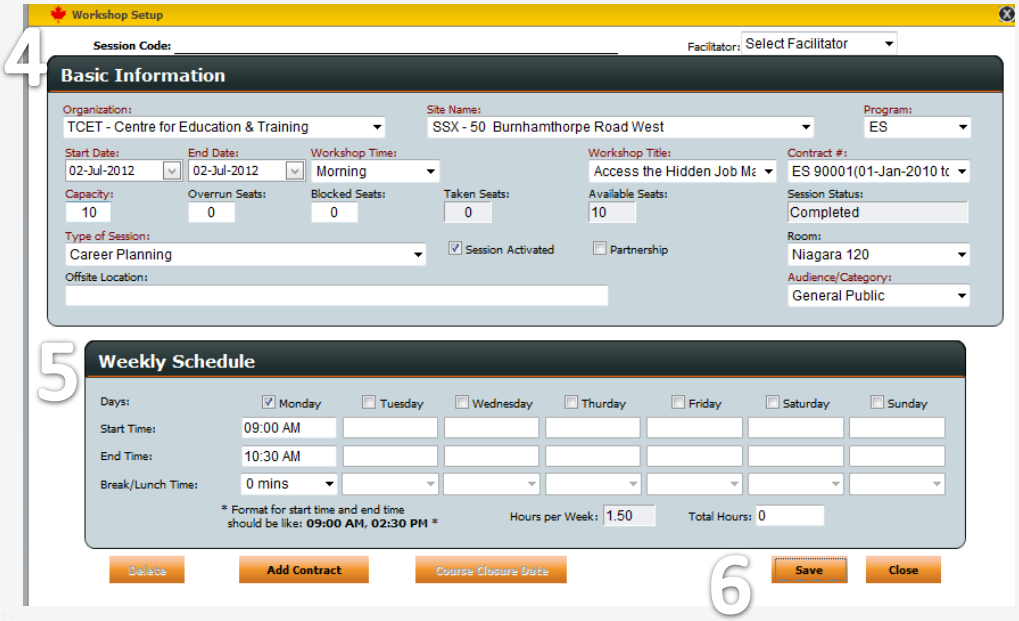
Add New Workshop



4. Input all basic information.
   NOTE: **Red** fields are mandatory
5. Input Weekly Schedule
6. Save

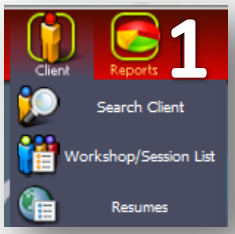
Tip: Use the < Copy to > action to easily duplicate a workshop/session.
Tip: If a drop-down menu variable is missing, a request must be submitted to the CETRA team to add.

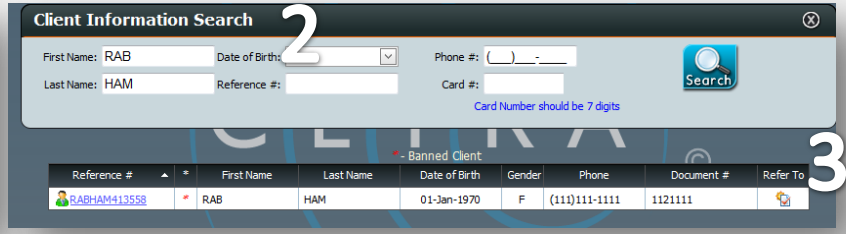
ES: If workshop is delivered by external agency where participant lists are undisclosed. Click on the **Partnership** checkbox (See **ES Undisclosed Participant Registration** for complete instructions)

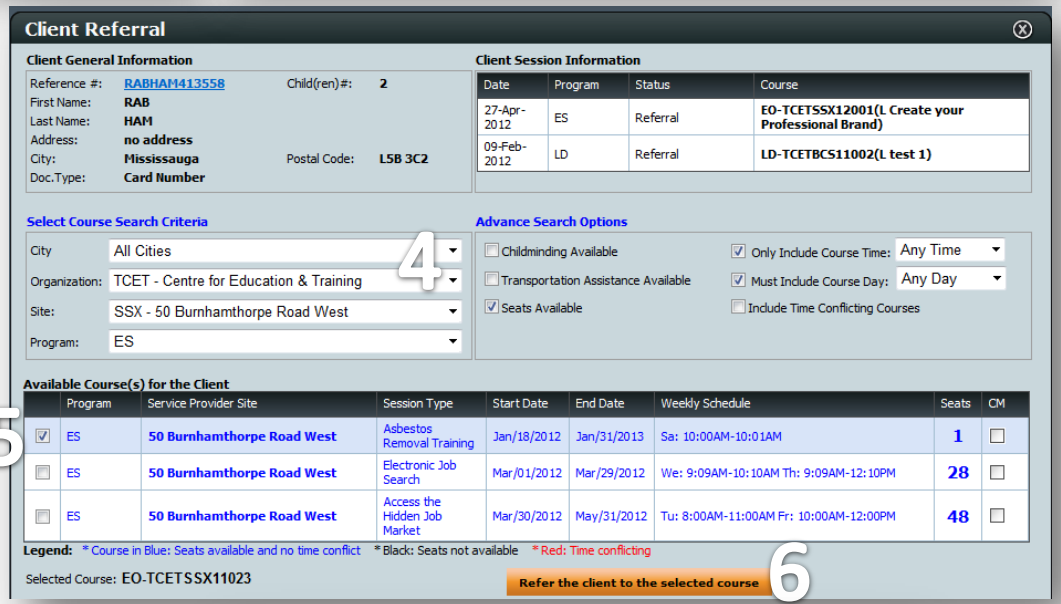


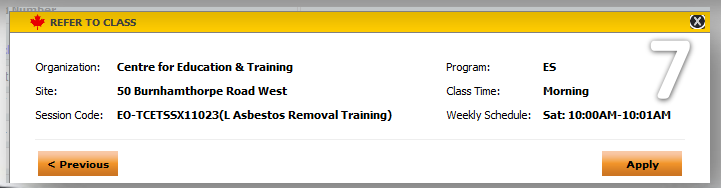
Workshop/Session: Referral

1. To refer a client to a workshop/session, go to **Search Client** from the **Client** menu or Shortcut menu
2. Search-find the client
3. From the search results, click the (Refer to) icon
   This section can also be accessed via **Service Summary**
4. From the **Client Referral** page, use the search criteria to find the workshop/session
5. Select the workshop/session by clicking the check-box
6. Click **Refer the client to the selected course**
7. Confirm the information and click **Apply**




Client Information Search
2
First Name: RAB
Last Name: HAM
Date of Birth:
Reference #:
Phone #:
Card #:
Search
Card Number should be 7 digits
* - Banned Client
Reference # | * | First Name | Last Name | Date of Birth | Gender | Phone | Document # | Refer To
RABHAM413558 | * | RAB | HAM | 01-Jan-1970 | F | (111)111-1111 | 1121111
3

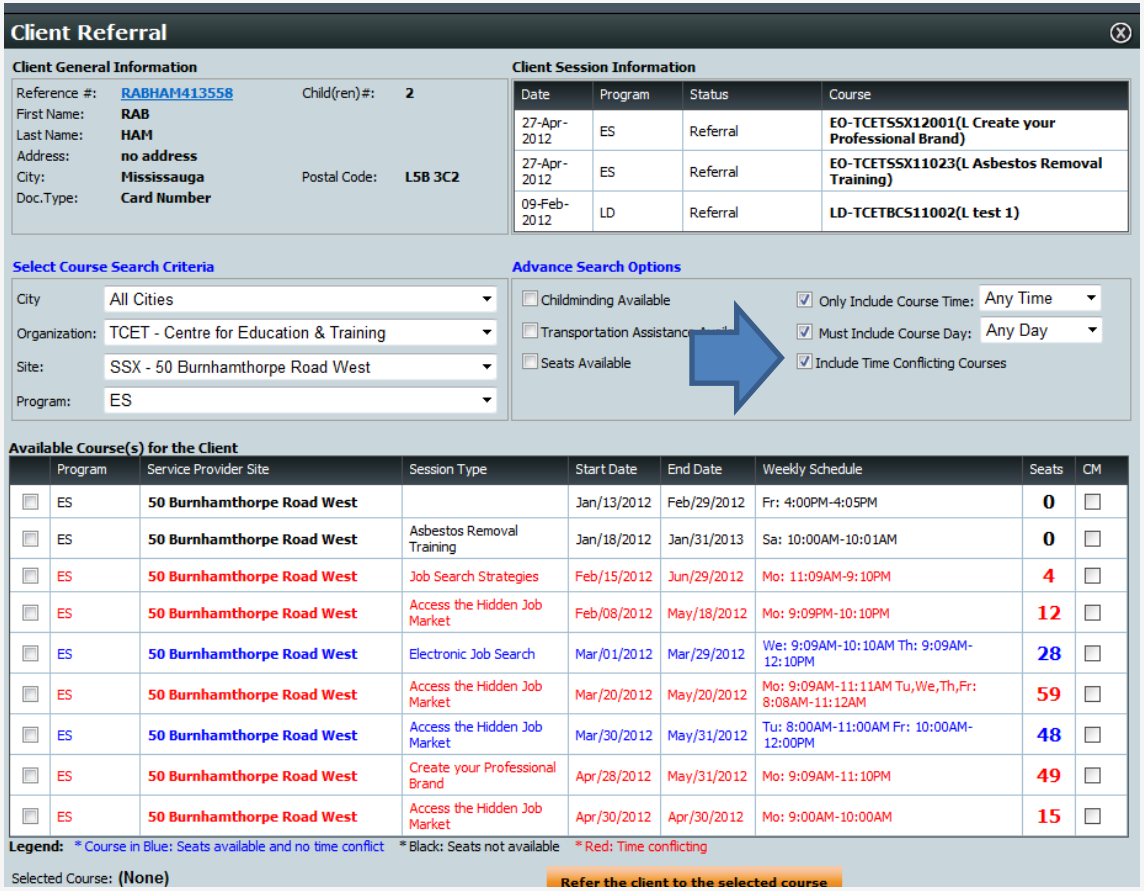

Client Referral
Client General Information
Reference #: RABHAM413558
Child(ren)#: 2
First Name: RAB
Last Name: HAM
Address: no address
City: Mississauga
Postal Code: L5B 3C2
Doc.Type: Card Number
Client Session Information
Date | Program | Status | Course
27-Apr-2012 | ES | Referral | EO-TCETSSX12001(L Create your Professional Brand)
09-Feb-2012 | LD | Referral | LD-TCETBCS11002(L test 1)
Select Course Search Criteria
City: All Cities
Organization: TCET - Centre for Education & Training
Site: SSX - 50 Burnhamthorpe Road West
Program: ES
4
Advance Search Options
Childminding Available
Transportation Assistance Available
Seats Available
Only Include Course Time: Any Time
Must Include Course Day: Any Day
Include Time Conflicting Courses
Available Course(s) for the Client
5
Program | Service Provider Site | Session Type | Start Date | End Date | Weekly Schedule | Seats | CM
ES | 50 Burnhamthorpe Road West | Asbestos Removal Training | Jan/18/2012 | Jan/31/2013 | Sa: 10:00AM-10:01AM | 1
ES | 50 Burnhamthorpe Road West | Electronic Job Search | Mar/01/2012 | Mar/29/2012 | We: 9:09AM-10:10AM Th: 9:09AM-12:10PM | 28
ES | 50 Burnhamthorpe Road West | Access the Hidden Job Market | Mar/30/2012 | May/31/2012 | Tu: 8:00AM-11:00AM Fr: 10:00AM-12:00PM | 48
Legend: * Course in Blue: Seats available and no time conflict * Black: Seats not available * Red: Time conflicting
Selected Course: EO-TCETSSX11023
Refer the client to the selected course
6



Workshop/Session: Referral (cont'd)

Troubleshooting:

- If you are unable to find a workshop in the search results, the client maybe registered for a session during that time period.
- Click the checkbox for **Include Time Conflicting Courses** under **Advance Search Options**
- This will cause all conflicting sessions to appear in red
- Sessions where seats have filled up will appear in black


Client Referral
Client General Information
Reference #: RABHAM413558
Child(ren)#: 2
First Name: RAB
Last Name: HAM
Address: no address
City: Mississauga
Postal Code: L5B 3C2
Doc.Type: Card Number
Client Session Information
Date | Program | Status | Course
27-Apr-2012 | ES | Referral | EO-TCETSSX12001(L Create your Professional Brand)
27-Apr-2012 | ES | Referral | EO-TCETSSX11023(L Asbestos Removal Training)
09-Feb-2012 | LD | Referral | LD-TCETBCS11002(L test 1)
Select Course Search Criteria
City: All Cities
Organization: TCET - Centre for Education & Training
Site: SSX - 50 Burnhamthorpe Road West
Program: ES
Advance Search Options
Childminding Available
Transportation Assistance
Seats Available
Only Include Course Time: Any Time
Must Include Course Day: Any Day
Include Time Conflicting Courses
Available Course(s) for the Client
Program | Service Provider Site | Session Type | Start Date | End Date | Weekly Schedule | Seats | CM
ES | 50 Burnhamthorpe Road West | | Jan/13/2012 | Feb/29/2012 | Fr: 4:00PM-4:05PM | 0
ES | 50 Burnhamthorpe Road West | Asbestos Removal Training | Jan/18/2012 | Jan/31/2013 | Sa: 10:00AM-10:01AM | 0
ES | 50 Burnhamthorpe Road West | Job Search Strategies | Feb/15/2012 | Jun/29/2012 | Mo: 11:09AM-9:10PM | 4
ES | 50 Burnhamthorpe Road West | Access the Hidden Job Market | Feb/08/2012 | May/18/2012 | Mo: 9:09PM-10:10PM | 12
ES | 50 Burnhamthorpe Road West | Electronic Job Search | Mar/01/2012 | Mar/29/2012 | We: 9:09AM-10:10AM Th: 9:09AM-12:10PM | 28
ES | 50 Burnhamthorpe Road West | Access the Hidden Job Market | Mar/20/2012 | May/20/2012 | Mo: 9:09AM-11:11AM Tu,We,Th,Fr: 8:08AM-11:12AM | 59
ES | 50 Burnhamthorpe Road West | Access the Hidden Job Market | Mar/30/2012 | May/31/2012 | Tu: 8:00AM-11:00AM Fr: 10:00AM-12:00PM | 48
ES | 50 Burnhamthorpe Road West | Create your Professional Brand | Apr/28/2012 | May/31/2012 | Mo: 9:09AM-11:10PM | 49
ES | 50 Burnhamthorpe Road West | Access the Hidden Job Market | Apr/30/2012 | Apr/30/2012 | Mo: 9:00AM-10:00AM | 15
Legend: * Course in Blue: Seats available and no time conflict * Black: Seats not available * Red: Time conflicting
Selected Course: (None)
Refer the client to the selected course

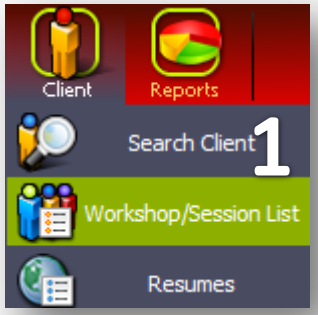
Workshop/Session: Attendance

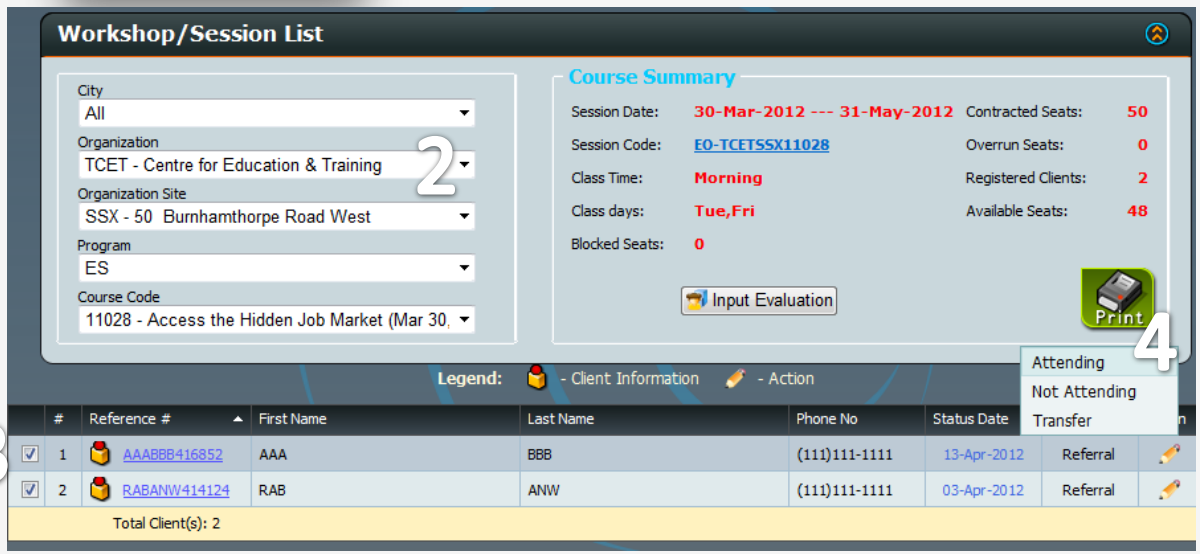
Session Attendance

1. From the **Client** Menu, click **Workshop/Session List**
2. Use the search criteria to view the list of registered clients
3. Click the check-box next to all clients who have attended
4. Click the icon then **Attending**

(Repeat steps for clients not attending, click **Not-Attending** instead of Attending)

Note: To print a sign-in sheet, click the Print button after step 2.



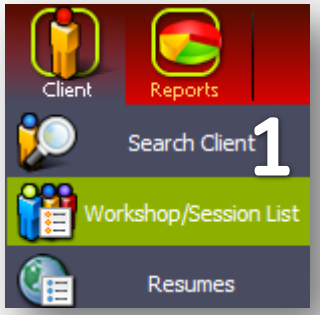


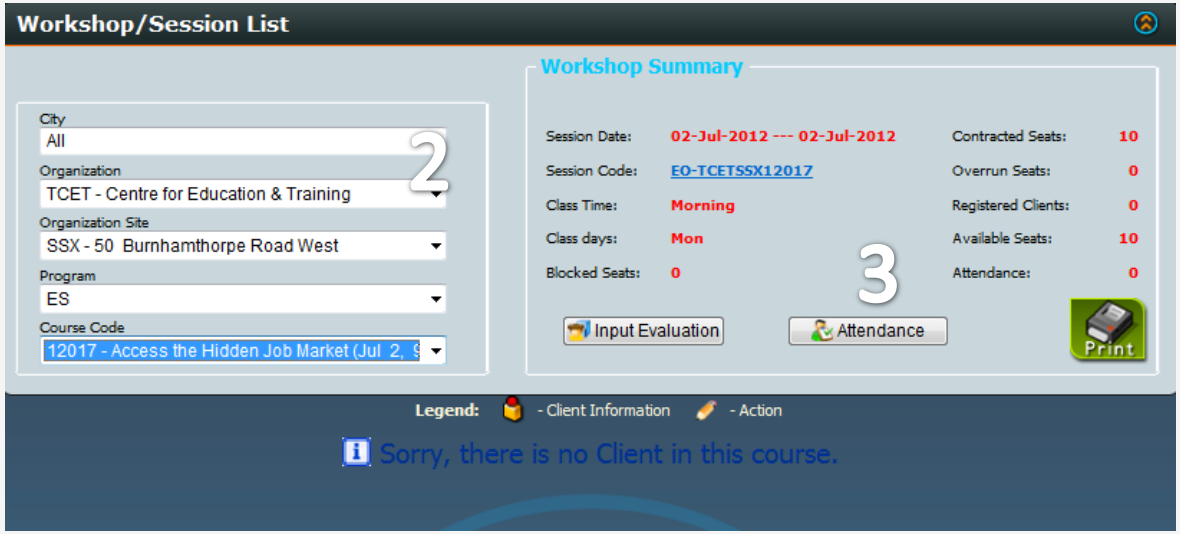
Workshop/Session: ES Undisclosed Participant Registration

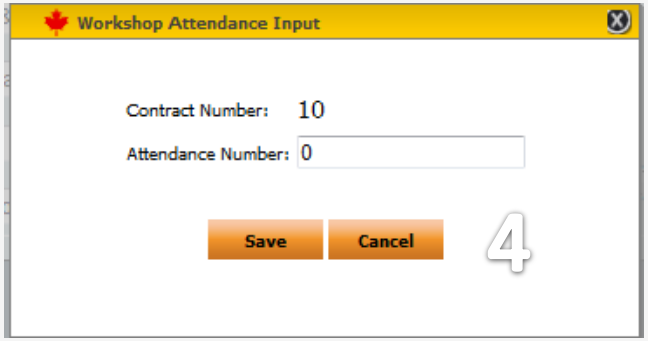
In ES workshops where participant list is not disclosed, attendance can be indicated manually.

1. From the **Client** Menu, click **Workshop/Session List**
2. Use the search criteria to view the list of registered clients
3. Click the Attendance button
4. A dialogue box will appear, enter the # of clients who attended.

   NOTE: In order to complete this attendance, the Partnership check-box must be selected in workshop setup. (See **Workshop/Session Setup** for complete instructions)

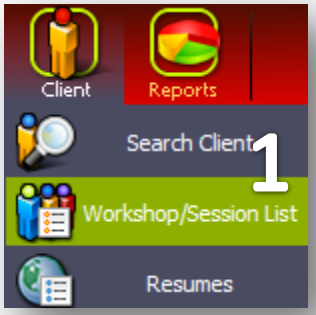


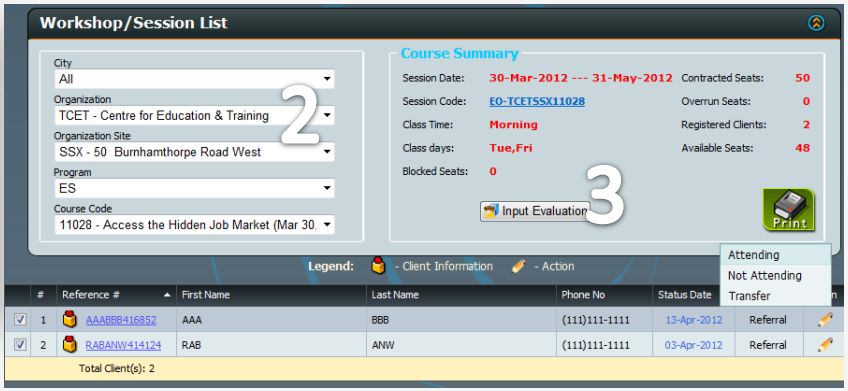




Workshop: Evaluation (ES)

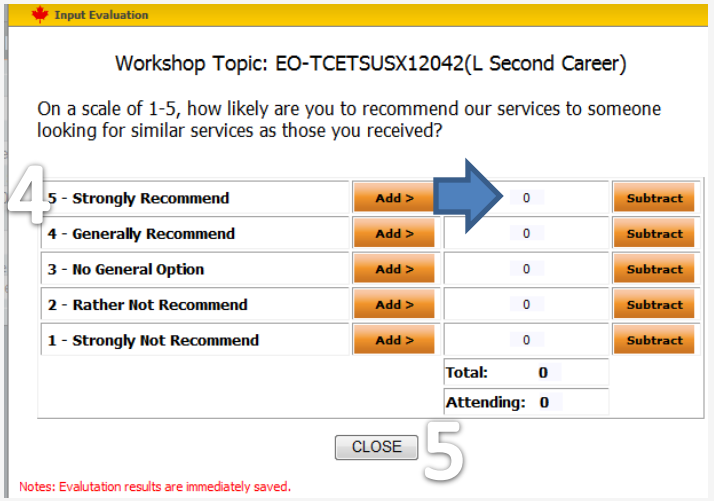
1. From the **Client** menu, select **Workshop/Session List**
2. Use the search criteria to view the list of registered clients
3. Click the Input Evaluation button
4. Input evaluation results by response. For each response, click the Add > button
5. Close



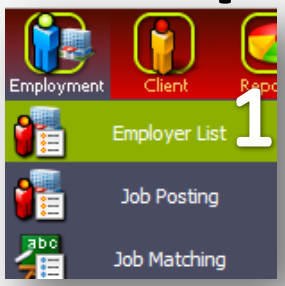


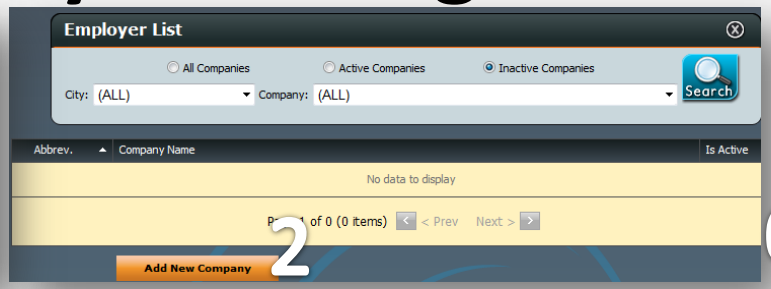
Note: Results cannot exceed the # of clients in "Attending" status

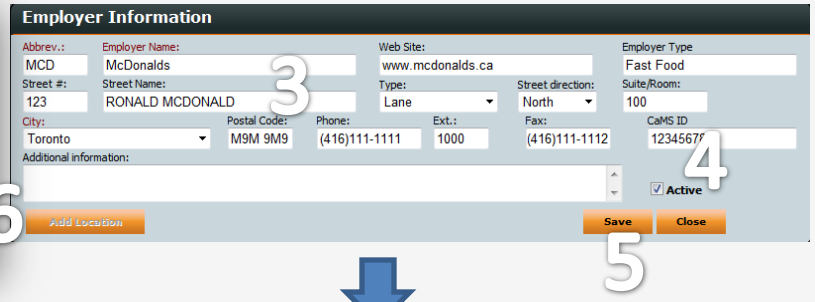
Note: Results are saved instantly

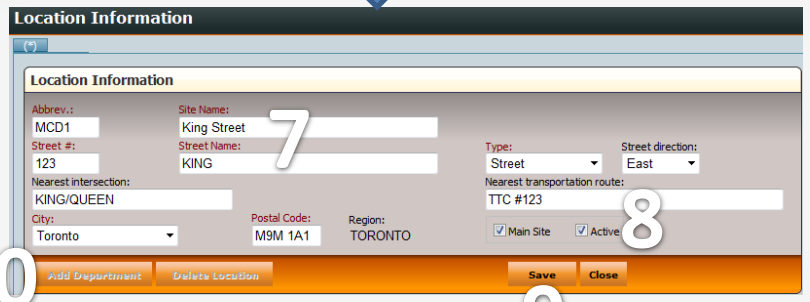

Input Evaluation
Workshop Topic: EO-TCETSUSX12042(L Second Career)
On a scale of 1-5, how likely are you to recommend our services to someone looking for similar services as those you received?
4
5 - Strongly Recommend Add > 0 Subtract
4 - Generally Recommend Add > 0 Subtract
3 - No General Option Add > 0 Subtract
2 - Rather Not Recommend Add > 0 Subtract
1 - Strongly Not Recommend Add > 0 Subtract
Total: 0
Attending: 0
CLOSE
5
Notes: Evalutation results are immediately saved.

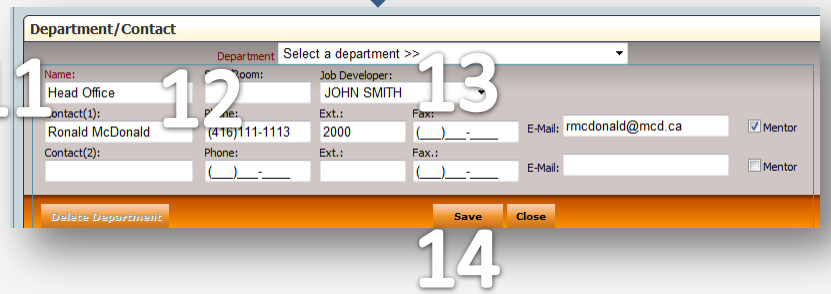
Employer Management: Setup (ES)









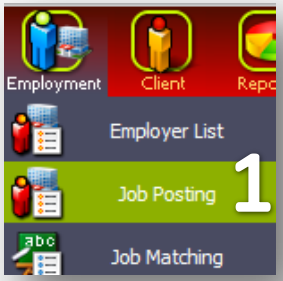


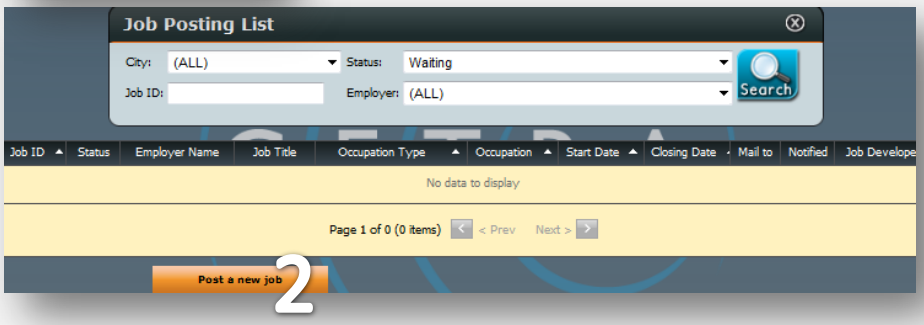
Job Developer

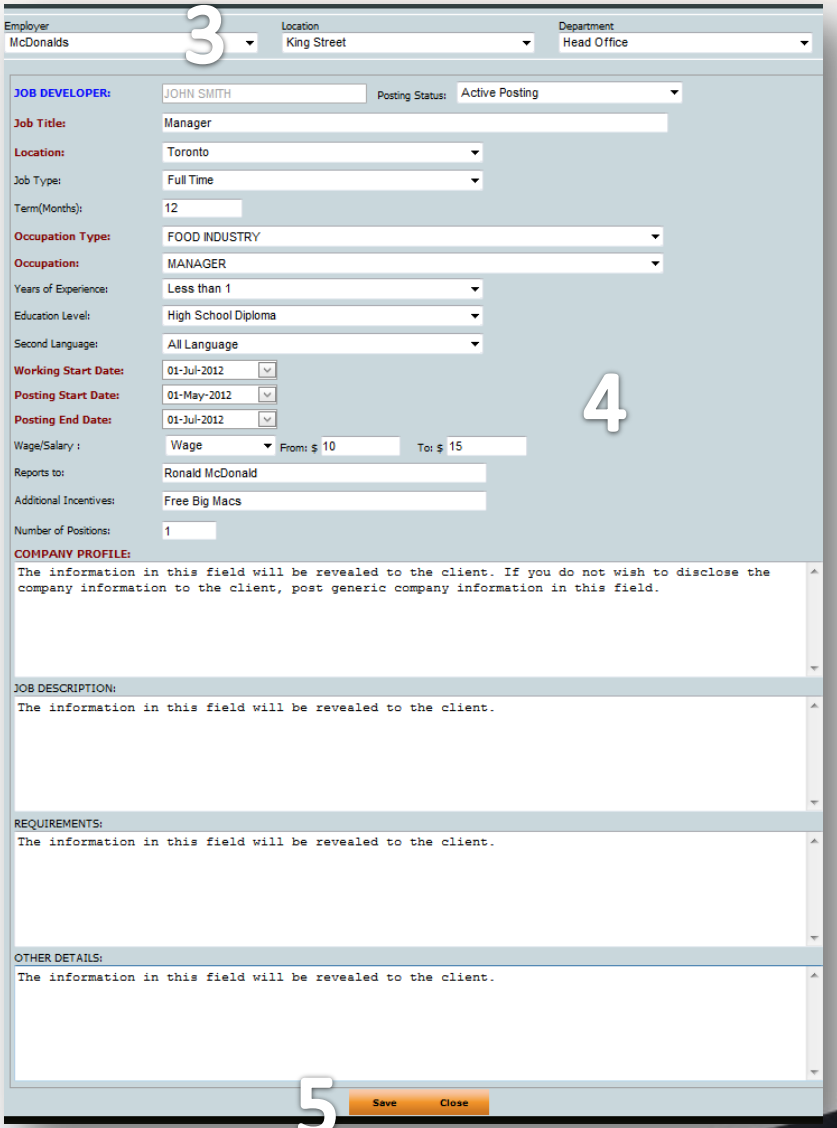
1. From the **Employment** menu, select **Employer List**
2. To add new employer, click **Add New Company**
3. Input employer data
4. Activate by selecting the Active check-box
5. Save
6. Click **Add Location**
7. Input location/site data
8. Activate by selecting the Active check-box
9. Save
10. Click **Add Department**
11. In **Name** field, input department name
12. Input contact data
13. Select **Job Developer** name
14. Save

Note: Employer must be set up *before* posting a job

Job Posting: Setup (ES)







Job Developer

1. From the **Employment** menu, select **Job Posting**
2. To post a new job, click **Post a new job**
3. Select employer/location/department from drop-down menus
4. Input job posting information
5. Save

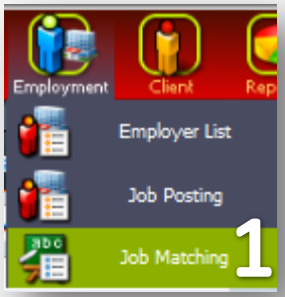
Note: To make a job posting inactive, use the Posting Status drop-down menu.

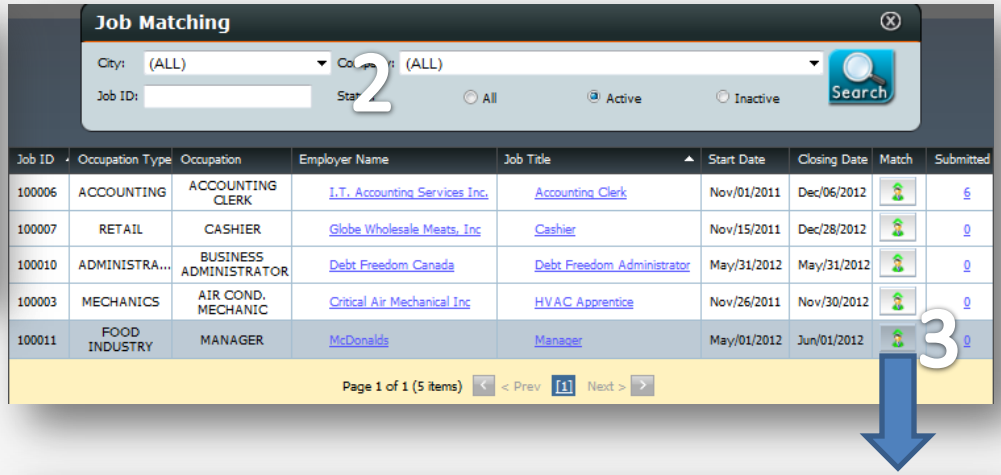
Job Matching: Search (ES)

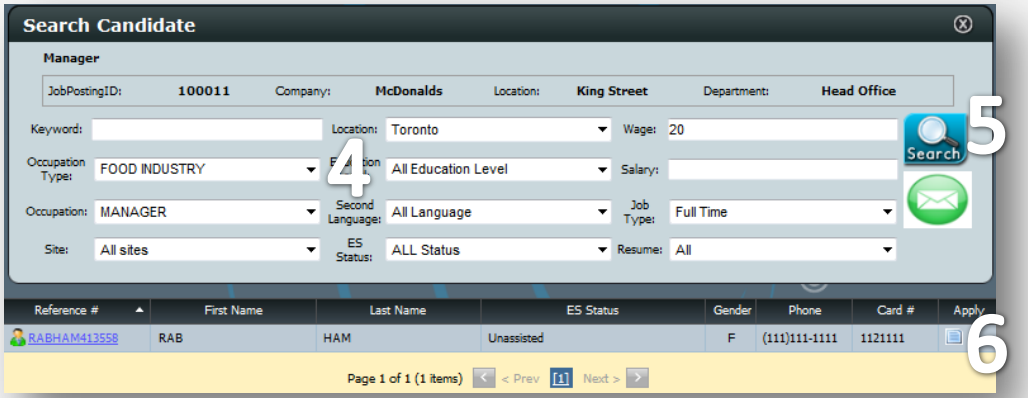
Job Developer OR Career Specialist

1. From the **Employment** menu, select **Job Matching**
2. Find the job you want to match clients for (use search to filter)
3. Click the (Match) button for that job
4. Amend the search criteria based on your preference
5. Click Search
6. From the search results, click the (apply) icon to view/select client resumes

(Cont'd on next)







Job Matching: Search (Cont'd)

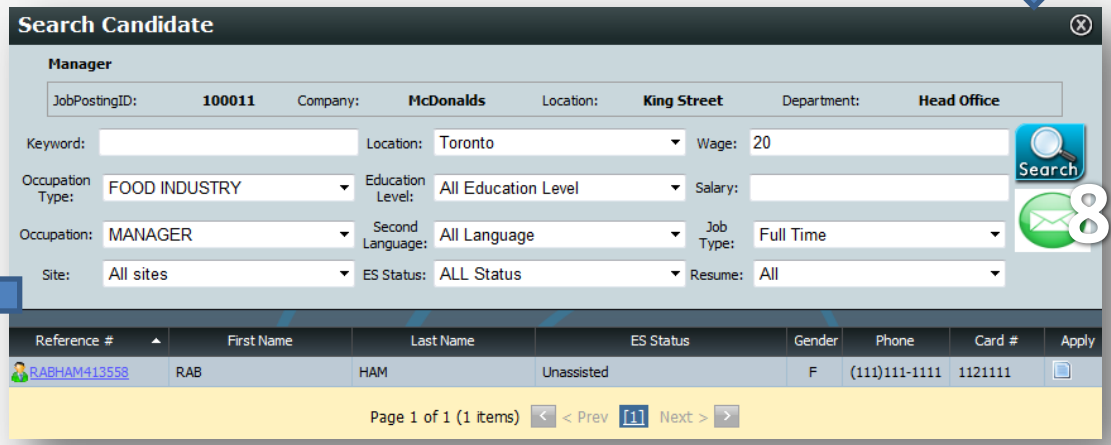
(cont'd from previous)

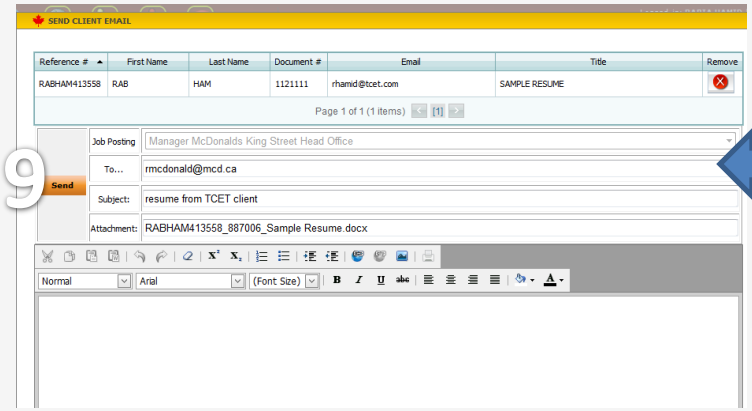
7. To select a resume to send to the employer, click the (add to list) icon.

Repeat for multiple clients as needed

8. To send resumes to employer, click the (send) icon.
9. Type email body as needed and click Send

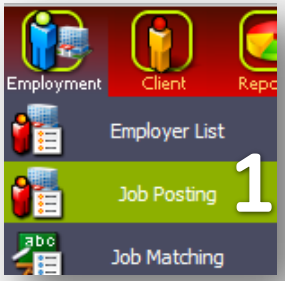
To remove client resume from attachment list, use the (remove) icon





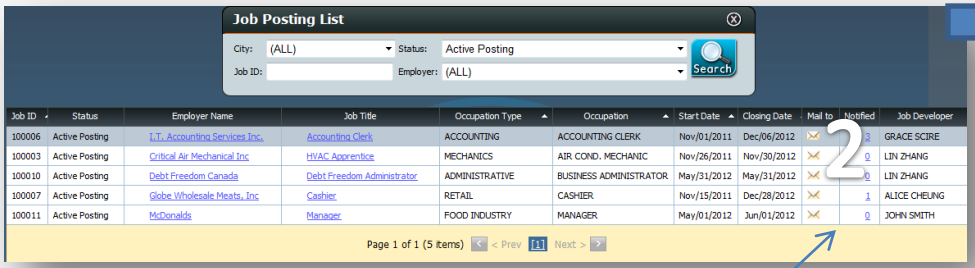
Note: Email history can be viewed via **Submitted** column in **Job Posting** or **ES History (Client File)**

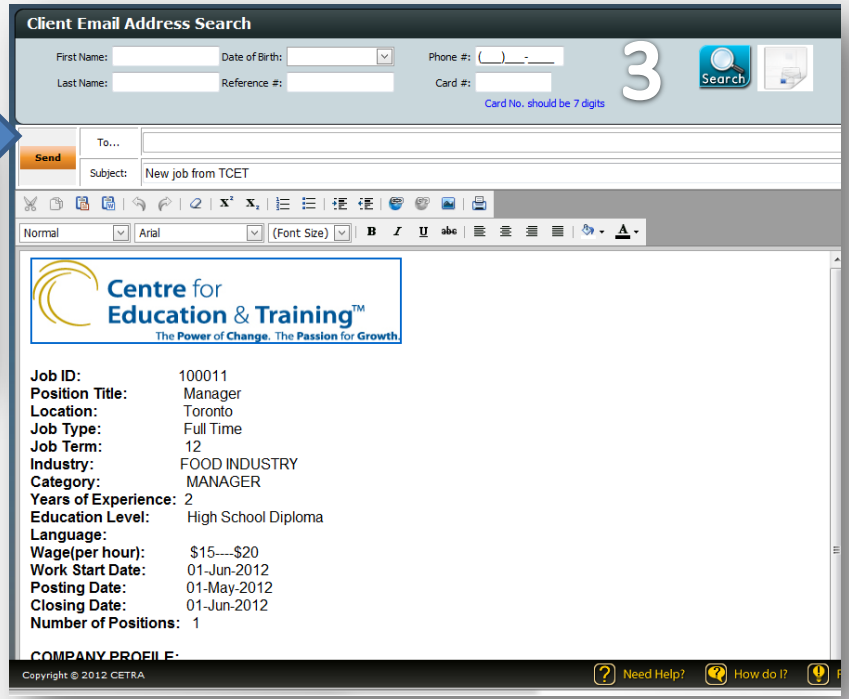
Job Posting: Send to client (ES)



Career Specialist or Job Developer

1. From the **Employment** menu, select **Job Posting**
2. Click the (email) icon for the selected job
3. Use the search to find the client
4. Edit the email body as needed
5. Send
6. Search next client as needed – or – close


Job Posting List
City: (ALL)
Status: Active Posting
Job ID:
Employer: (ALL)
Search
2
Job ID | Status | Employer Name | Job Title | Occupation Type | Occupation | Start Date | Closing Date | Mail to | Notified | Job Developer
100006 | Active Posting | I.T. Accounting Services Inc. | Accounting Clerk | ACCOUNTING | ACCOUNTING CLERK | Nov/01/2011 | Dec/06/2012 | | 2 | GRACE SCIRE
100003 | Active Posting | Critical Air Mechanical Inc | HVAC Apprentice | MECHANICS | AIR COND. MECHANIC | Nov/26/2011 | Nov/30/2012 | | 0 | LIN ZHANG
100010 | Active Posting | Debt Freedom Canada | Debt Freedom Administrator | ADMINISTRATIVE | BUSINESS ADMINISTRATOR | May/31/2012 | May/31/2012 | | 0 | LIN ZHANG
100007 | Active Posting | Globe Wholesale Meats, Inc | Cashier | RETAIL | CASHIER | Nov/15/2011 | Dec/28/2012 | | 1 | ALICE CHEUNG
100011 | Active Posting | McDonalds | Manager | FOOD INDUSTRY | MANAGER | May/01/2012 | Jun/01/2012 | | 0 | JOHN SMITH
Page 1 of 1 (5 items) < Prev 1 Next >



Note: Email history can be viewed via **Notified** column or **ES History (Client File)**